DEPARTMENT OF HEALTH & HUMAN SERVICES

Centers for Medicare & Medicaid Services

Office of Technology Solutions

Identity and Credentialing Tool (ICT)
Point of Contact (POC) Guide

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Version 2.7

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1.0 Introduction

When a contract is entered into the Identity and Credentialing Tool (ICT), a primary Point of Contact (POC) is designated. **The POC possesses Approval Authority for that contract.** A user may request to be a POC Approval Authority for multiple contracts. Approval Authority will provide the user the ability to manage access requests only for those specific contracts. The **Manage > POC Access Request** feature allows POC the ability to search for access requests, review the information provided for the access request, approve the request, return it to the requester for modification, or reject and delete the request.

A POC must first register for an ICT account before they can manage access requests. During the registration process, **the email address entered by the user will be matched against the contract's POC email address in the system**. If there is a match, the user will be assigned with the POC role. The **POC will need to fill out the form online and click the Save Request button**.

In many cases, the **primary POC would like to delegate Approval Authority to another user,** allowing them to manage access requests on the POC's behalf. In order to be the new Approval Authority delegate, a non-POC user must register for an ICT account. **The new POC requesting authority** will need to log in to ICT, click on the username link on the top menu, and click on the Manage Authorities option to initiate the request for Approval Authority. The request for Approval Authority will be sent to the contract's POC email address and the primary POC will be able to grant or deny it directly from the link options provided in the email. **Once the Approval Authority is granted, the new POC delegated authority will be able to manage access request on the POC's behalf.** If the POC email address is incorrect, please work with your COR (Contract Officer Representative) to have the CO (Contract Officer) update this in CAMS (Comprehensive Acquisition Management System). CAMS pulls its information about contractors from SAM.gov; therefore, contractors should ensure the POC in SAM.gov is current and able to complete the above process.
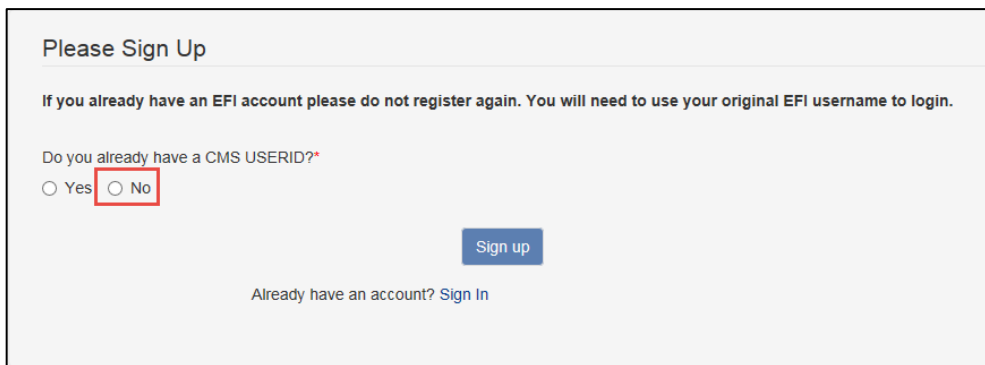
2.0 ICT Registration

The registration process requires the user to first respond to the question, "Do you already have a CMS USERID?"

As a new user of ICT, your answer will be "No". The user is required to enter a desired username, password, first name, last name, and an email address. The user must also enter their email address a second time. After the user clicks the "Sign Up" button, the user will receive an email containing a link to verify the user's ownership of the email address and to enable (activate) the ICT account.

Note: If you entered a personal email address, this will be used to notify you during the approval process and create your new CMS ID in EUA. If you have an email from your company, it is recommended that you use it.

1. Click **Register** on the ICT log in page (EUA-ICT Home Page).
2. Select the **No** radio button to answer the question, "Do you already have a CMS USERID?" (Figure 1)

Figure 1: Register – Provide answer to "Do you have a CMSID"

3. Enter the personal information requested by the **Please Sign Up** form.

4. After you finish filling in all the required fields, click the **Sign up** button ([Figure 2](#)).

Figure 2: Register - Complete Sign-up Form

5. You will be directed to the main HOME page with a confirmation that you have successfully registered and to follow the instructions from the automated email to activate (enable) your ICT account. Please check your JUNK or SPAM folder if you have not received the email directly in your INBOX ([Figure 3](#)).

Figure 3: Register – Confirmation of a Successful Registration

6. Click the **Activate ICT Account** link provided within the email (Figure 4).

    Note: Do not use this link to log in to ICT. Please open a new browser and enter the URL manually.

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Tuesday, April 10, 2018 8:51 AM
To: Doe, Jane <jane.doe@test.com>
Subject: EFI User Verification for Jane Doe

Hello Jane Doe,

Thank you for registering with the EFI application. The EFI application is used to create a request for a CMS EUA ID so that you may access CMS data or CMS systems. Please click on the link below to verify your email and activate your account.

Activate EFI Account

Thank you,
Enterprise User Administration (EUA)

Figure 4: Register – ICT User Verification Email
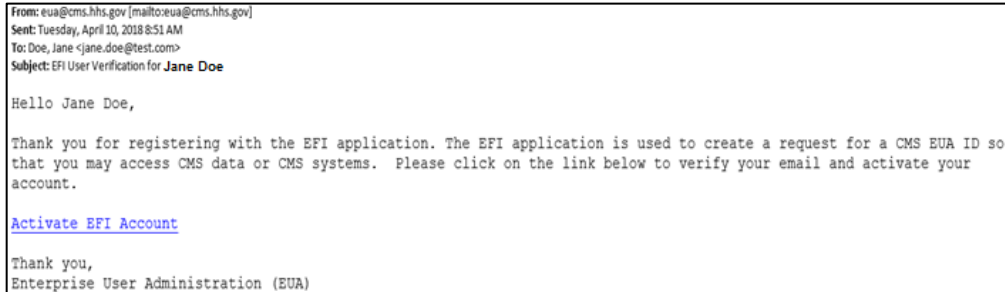
7. You will be directed to the ICT log in page with the following confirmation message: "Your account is now verified and active."
8. This concludes the Registration process. You can use your username and password to log in to ICT.
9. Reference the 3.0 EUA Credentials Sign-In Method: Username and Password section for steps to log in with your username and password.

3.0 EUA Credentials Sign-In Method: Username and Password

If you are a POC and have an EUA ID, you must sign in using your EUA username and password or PIV Card.

1. **Enter** https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign-In page. If you have an active EUA ID, use the EUA Credentials Sign-In on the left side of the page. (Figure 5)

Figure 5: ICT Sign-In Page

2. **Enter** your EUA username/password and **click** Sign In.
3. **Agree** to the terms on the Warning Screen. (Figure 6)

Figure 6: Warning Screen

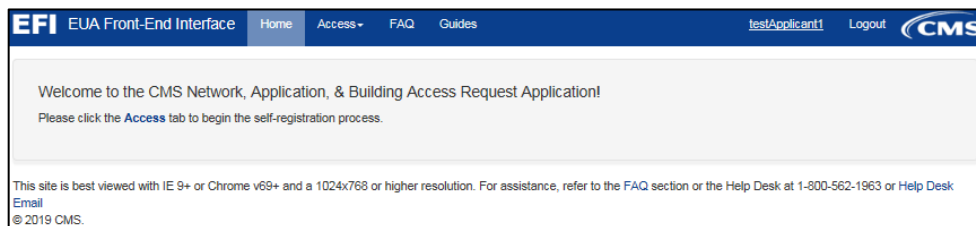4. A successful log in will take you to the ICT homepage. ([Figure 7](#))

Figure 7: ICT Homepage

4.0 EUA Credentials Sign-In Method: PIV Card

1. **Enter** https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign-In page. If you have an active EUA ID, use the EUA Credentials Sign-In on the left side of the page. (Figure 8)

Figure 8: ICT Sign-In Page

2. **Click** CMS PIV Card Only.
3. **Agree** to the terms on the Warning Screen. (Figure 9)

Figure 9: Warning Screen

4. If prompted by your web browser, **select** your PIV certificate. **Enter** your PIV pin in the pop-up ActivClient dialog box and click OK. ([Figure 10](#))
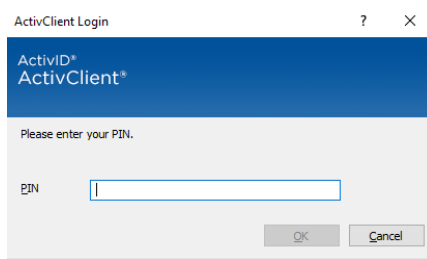
Figure 10: PIV Pin Pop-Up

5. A successful log in will take you to the ICT homepage. ([Figure 11](#))
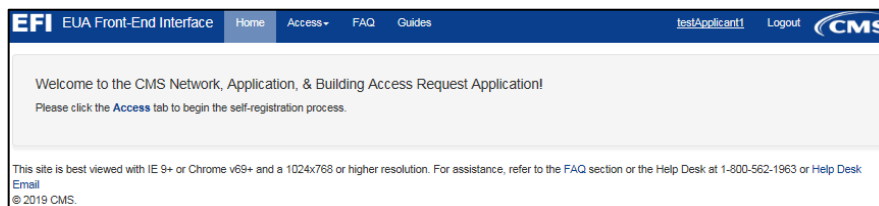
Figure 11: ICT Homepage

5.0 Sign-In Method with ICT Credentials

If you are a POC and *DO NOT* have an EUA ID, you must sign in using your ICT username and password.

1. **Enter** https://eua.cms.gov/efi in your preferred web browser to take you to the ICT Sign-In page. Use the ICT Credentials Sign In located on the right side of the page. (Figure 12)

Figure 12: ICT Sign-In Page

2. **Enter** your ICT username/password and **click** Sign In. The ICT username is case sensitive so it must be entered exactly the same when it was registered.
3. **Agree** to the terms on the Warning Screen. (Figure 13)

Figure 13: Warning Screen

4. A successful log in will take you to the ICT homepage. ([Figure 14](#))

Figure 14: ICT Homepage
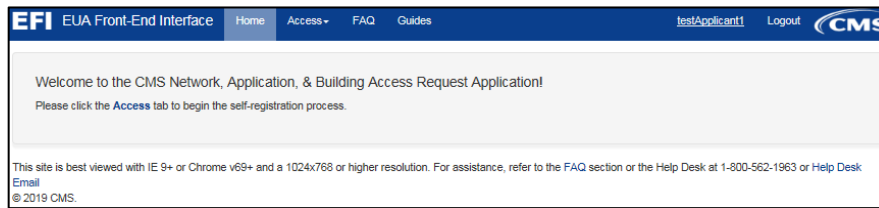
6.0 Approve Access Request

The following steps will guide the POC Approver in reviewing the access request, attesting to its accuracy, and approving it. The applicant will receive an email confirmation of the approval.

STOP: Before managing access requests, you must have an ICT account (Please refer to the ICT New User Guide for instructions on the registration process) and ask your CMS COR for assistance. If you are the primary POC for the contract, please use the exact email address during the registration process, as it will be matched against the contract's POC email address. If there is a match between the email address entered and the contract's POC email address, you will be assigned the POC role. If there is no match, as a POC (primary or delegated), you will need to fill out the form online and just click the Save Request button (this is to create the new POC record in ICT.

1. From the ICT log in page (https://eua.cms.gov/efi) enter your EUA Credentials, if you have an EUA ID or ICT Username and Password and then click the Log In button (Figure 15). (ICT Credentials are case-sensitive)

Figure 15: ICT Sign-In Page

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful log in will take you to the ICT Home page, please go to the top menu and click **Manage** and then click on **POC Access Requests** (Figure 16).

    Note: You can verify if you have the ICT Point of Contact Role when you click on the username link on the top menu.
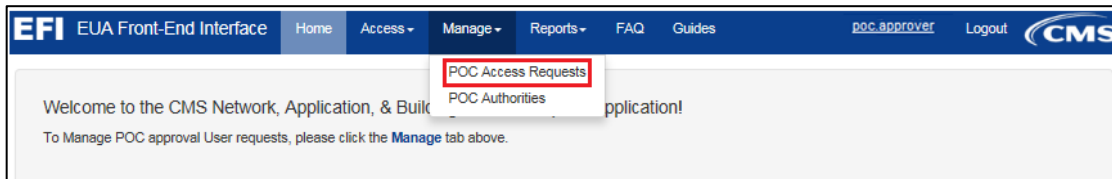

Figure 16: POC Access Requests – Menu

3. Search for the request using the **Search** text field on the "Manage Submitted Access Requests" page.

4. Click the **Review** link button for the request you want to review, and then approve once you have verified that the information in the applicant request is correct. You can go to the first or last page in the queue by clicking **First** or **Last** (Figure 17).
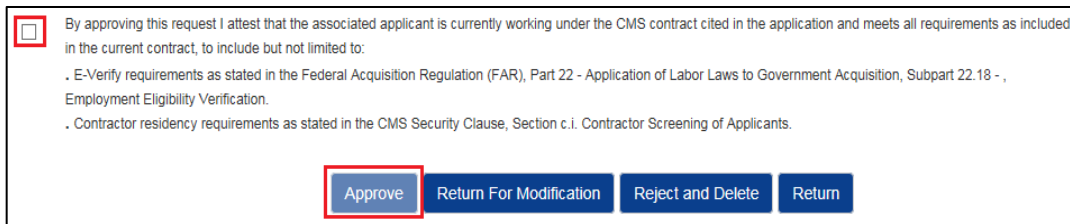
    Note: The PIV Request column displays the Reason for Issuance for the request with values of New Application, Renewal, Lost, Stolen, Damaged, Expired, and Name Change.

Figure 17: Manage Submitted Access Requests – Page

5. Once you complete the review of the applicant request and before proceeding, you will need to click the Attestation check box (required), so the **Approve** button becomes available for your approval ([Figure 18](#)).

   Note: As a POC, you will be able to open and view the PIV Training Certificate and "Other" documentation. You can only confirm the presence of the Resume and OF-306. OSSO uses these documents when processing the request.

Figure 18: Approve Access Request – Button
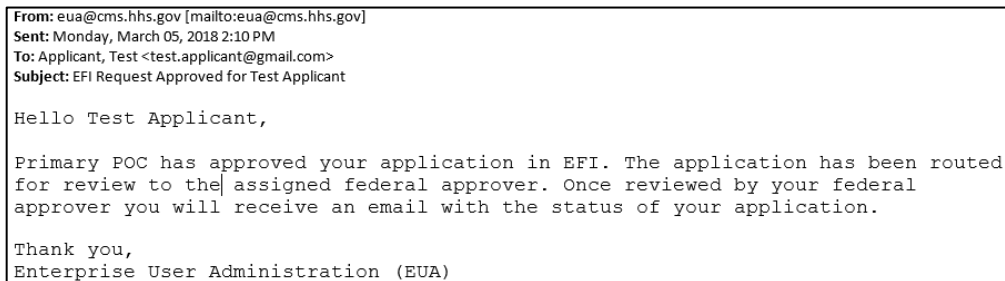
6. An email confirmation will be sent to the applicant and to the POC approver (both will receive separate emails) to notify of the request approval ([Figure 19](#)).

Figure 19: Email notification of the request approved

6.1 Return to Manage Submitted Access Requests

The following steps will guide the POC Approver on how to return to the Manage Requests page to see the list of pending requests. If you need to continue to review a request, please refer to the steps in the 6.0 Approve Access Request section.

1. If you need to return to the Manage Access Requests page, click the **Return** button on the Details page (Figure 20).

Figure 20: Return to Manage Submitted Access Requests – Return button

2. The button will return you to the Manage Submitted Access Requests page where you can see the list of your pending requests. Any sorting or filtering you might have made will be retained (Figure 21).

Figure 21: Return to Manage Submitted Access Requests – Page

7.0 Return Access Request for Modification

The following steps will guide the POC Approver on reviewing the access request, indicate the Access Request form fields that need to be reviewed, and send it back to the requester for modification. An email confirmation will be sent to the requester informing them of the required modification. When the requester returns to view the request, the form fields and the sections will be marked for correction.

1. From the ICT log in page (https://eua.cms.gov/efi) enter your EUA Credentials, if you have an EUA ID or ICT Username and Password and then click the Log In button (Figure 22). (ICT Credentials are case-sensitive)
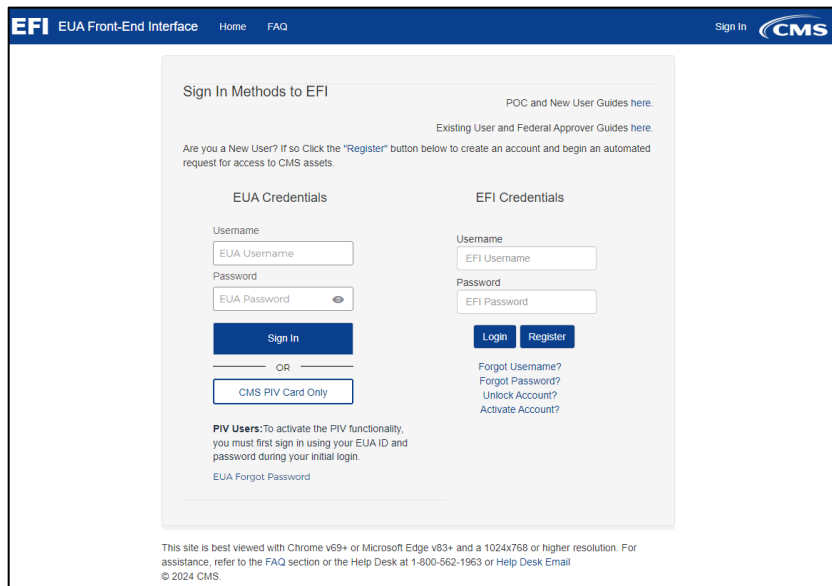
Figure 22: ICT Sign-In Page

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful log in will take you to the ICT Home page. Please go to the top menu and click **Manage** and then click on **POC Access Requests** (Figure 23).
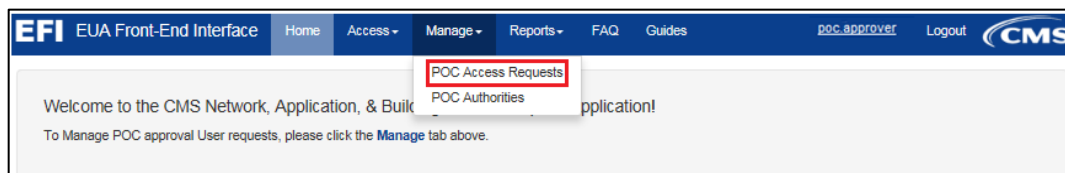
Figure 23: Return Access Request for Modification – Menu

3. Search for the request using the **Search** text field on the "Manage Submitted Access Requests" page.

4. Click the **Review** link button for the request you want to review to make sure that the information in the applicant request is correct. You can go to the first or last page in the queue by clicking **First** or **Last** ([Figure 24](#)).

Figure 24: Return Access Request for Modification – Page

5. Review the request information and click the **Return For Modification** button on the Status page ([Figure 25](#)).

Figure 25: Return Access Request for Modification – Button

6. From the *Section* and *Field* dropdown options, provide a *Reason* in the "Decline Reasons" pop-up box for each revision you would like the requester to make changes.

7. Click the **Add** button to add another field to review. For the "Reason", you will need to type less than 255 characters ([Figure 26]).

   Note: "Problems:" counter indicates how many fields are already indicated to be revised.
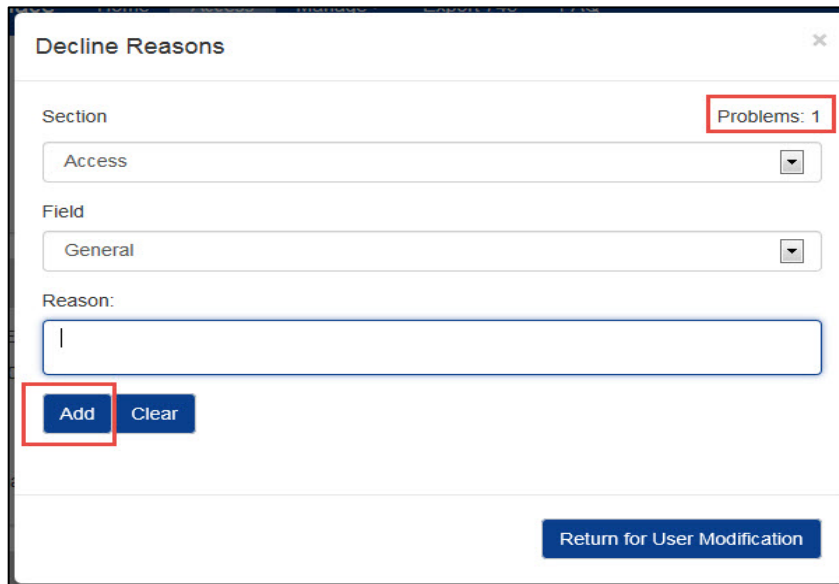
Figure 26: Return Access Request for Modification - Decline Reasons Form

8. Once you have indicated all the fields for revision, click the **Return for User Modification** button.
9. An email confirmation message will be sent to the applicant with information on how to correct the request ([Figure 27]).

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: Applicant, Test <test.applicant@gmail.com>
Subject: EFI Request Returned for Modification: Test Applicant

Hello Test Applicant,

Primary POC has returned your EFI Access Request for modification. Please log into EFI, review your request, and correct any mistakes marked by the reviewer.

Thank you,
Enterprise User Administration (EUA)

Figure 27: Email Notification of the Request Returned for Modification

8.0 Reject and Delete Access Request

The following steps will guide the POC Approver on rejecting and deleting the access request from the system. The POC may choose to provide a reason for the deletion of the request. Once the access request has been deleted, the requester's account will also be deleted from the ICT system. An email message will be sent to the requester informing them of the deletion. If the requester would like to re-submit the request, they would need to re-register in ICT and re-create the access request.

1. From the ICT log in page (https://eua.cms.gov/efi) enter your EUA Credentials, if you have an EUA ID or ICT Username and Password, and then click the Log In button (ICT Credentials are case-sensitive) (Figure 28).

Figure 28: ICT Sign-In Page

2. At the WARNING pop-up message, click the Agree button once you are ready to continue. A successful log in will take you to the ICT Home page. Go to the top menu, click Manage, and then click on POC Access Requests (Figure 29).
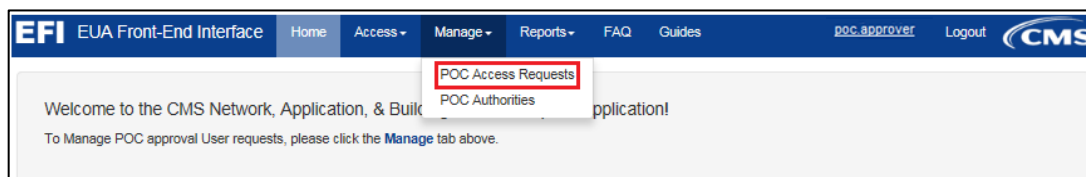
Figure 29: Reject and Delete Access Request – Menu

3. Search for the request using the **Search** text field on the "Manage Submitted Access Requests" page.

4. Click the **Review** link button for the request you want to review. You can go to the first or last page in the queue by clicking **First** or **Last** ([Figure 30](#)).

Figure 30: Reject and Delete Access Request – Page

5. Review the request information and click the **Reject and Delete** button on the Status page ([Figure 31](#)).

Figure 31: Reject and Delete Access Request – Button

6. Provide a *Decline Reason* and then click the **Reject and Delete** button again on the pop-up box ([Figure 32](#)).

Note: For the "Decline Reason", you must type less than 255 characters.

Figure 32: Reject and Delete Access Request - Pop-up Box

7. An e-mail confirmation will be sent to the requester informing them of the rejection of their request. The user will need to re-register and submit another request if needed.

9.0 Request POC Approval Authority

The following steps will guide a regular user on how to request POC Approval Authority from the primary POC using the POC's email address designated in the contract. An email message will then be sent to the primary POC prompting them to grant or deny Approval Authority to the requester. Once POC Approval Authority is granted, the user will be able to view, approve, return for modification, reject and delete access requests on behalf of the POC.

A maximum of one (1) user can be assigned delegated Approval Authority at a time per primary POC. The duration for a delegation of Approval Authority is twenty-one (21) calendar days.

> **STOP:** Before you start, you must have an ICT account (Please refer to the ICT New User Guide for instructions on the registration process) and ask your CMS COR for assistance. Please use the contract's POC email address to obtain the POC role.

Note: The primary POC must register and have an ICT account so that when another user requests the approval authority, the POC role can be added. Approval Authority can be granted to more than one designated user from the contractor company.

1. From the ICT log in page (https://eua.cms.gov/efi) enter your EUA Credentials, if you have an EUA ID or ICT Username and Password and then click the Log In button (ICT Credentials are case-sensitive) (Figure 33).

Figure 33: ICT Sign-In Page

2. From the ICT top menu, click the username link button on the ICT home page (Figure 34).
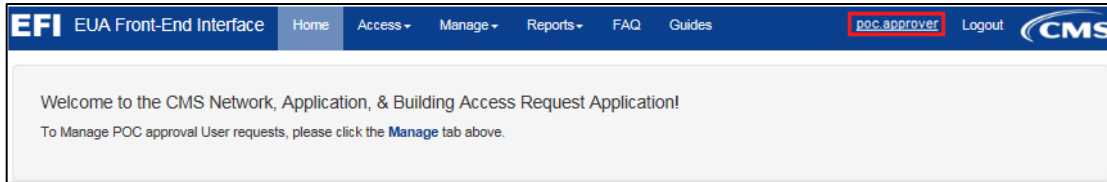
Figure 34: Request Approval Authority – Menu

3. Click the **Manage Authorities** link button on the "Account Details" page (Figure 35).
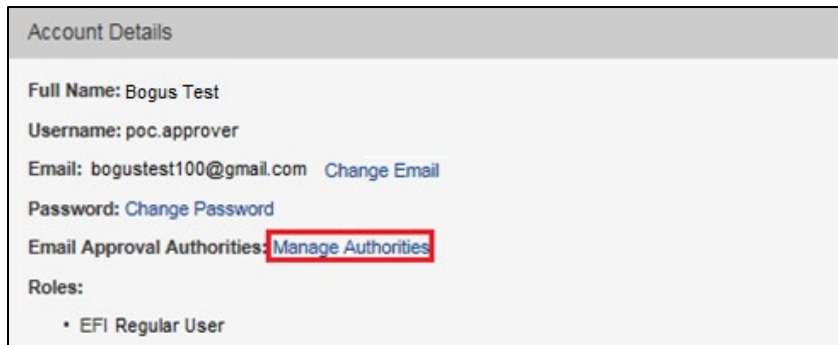
Figure 35: Request Approval Authority - Account Details Page

4. In the **Add Email Address** text field, enter the email address of the primary POC (setup in the contract) on whose behalf you are requesting POC delegated authority and then click the **Add** button (Figure 36).
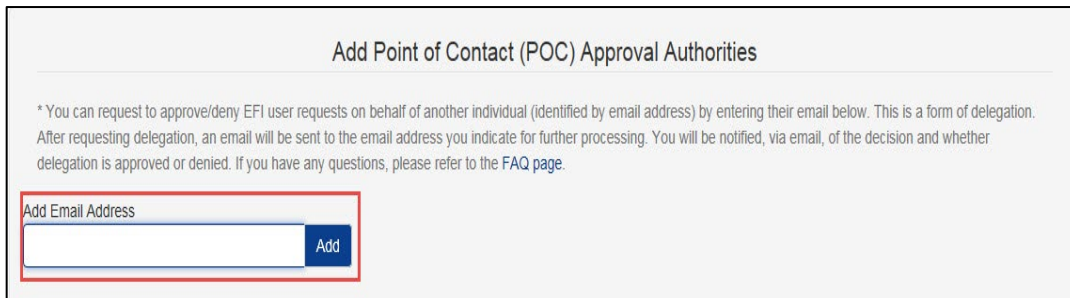
Figure 36: Request Approval Authority - Add POC Email

5. An email will be sent to the primary POC from your delegated approval authority request.

10.0 Approve and Deny Approval Authority

The following steps will guide the primary POC on how to review an email message when an Approval Authority request has been made. Two links are provided to grant or deny Approval Authority to the requester(s).

A maximum of one (1) user can be assigned delegated Approval Authority at a time per primary POC. The duration for a delegation of Approval Authority is twenty-one (21) calendar days.

Note: The primary POC will approve or deny the delegated approval in an email only.

1. As a primary POC you will receive an email if a user has requested Approval Authority (Figure 37).
2. Review the ICT **Approval Authority Request email** and click either the **Grant Approval Authority to <user>** or **Deny Approval Authority to <user>** link from within the email to grant or deny Approval Authority. After you click one of the links based on your decision then you will be re-directed to the ICT log in page with a confirmation for the Approval Authority denied or granted (Figure 38 and Figure 39).

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: POC, Primary <primary.poc@gmail.com>
Subject: New EFI Approval Authority Request from Requester POC

Hello,

Requester POC has requested EFI Approval Authority for the email address primary.poc@gmail.com. Granting approval will allow this user to approve or deny user requests on behalf of primary.poc@gmail.com where primary.poc@gmail.com is listed as the Point of Contact (POC) for a contract, company, or state agency.

Please use the links below to Grant or Deny their request.

Grant Approval Authority to Requester POC

Deny Approval Authority to Requester POC

Thank you,
Enterprise User Administration (EUA)

Figure 37: Approve and Deny Approval Authority Request Email
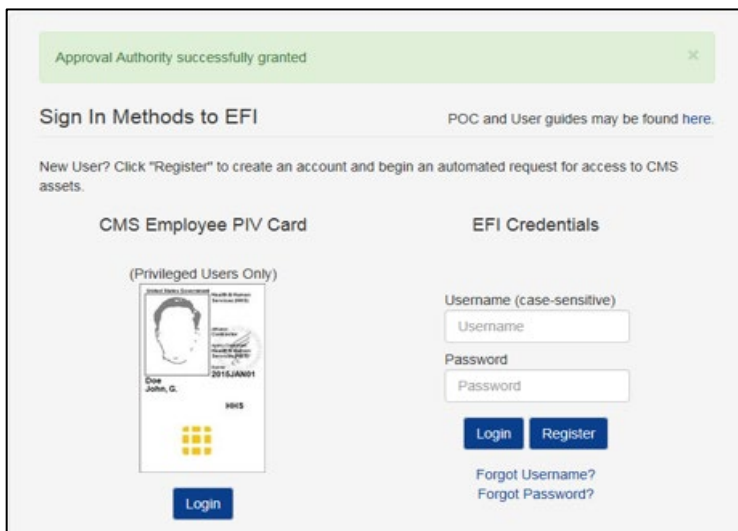
Figure 38: Approval Authority Granted

Figure 39: Approval Authority Denied

3. An **email confirmation** will be sent to the user who requested Approval Authority informing of the decision (Figure 40).

From: eua@cms.hhs.gov [mailto:eua@cms.hhs.gov]
Sent: Monday, March 05, 2018 2:10 PM
To: POC, Requester <requester.poc@gmail.com>
Subject: New EFI Approval Authority Granted for Requester POC

Hello,

Approval Authority request primary.poc@gmail.com made by Requester POC has been approved. To manage requests, please log into EFI and use the manage tab.

Thank you,
Enterprise User Administration (EUA)

Figure 40: Approval Authority Granted Email Confirmation

11.0 Manage Approval Authority

The following steps will guide the POC on how to view all the users with delegated Approval Authority. The POC also has the option to remove Approval Authority from a user after an authority has been granted.

A maximum of one (1) user can be assigned delegated Approval Authority at a time per primary POC. The duration for a delegation of Approval Authority is twenty-one (21) calendar days.

1. From the ICT log in page (https://eua.cms.gov/efi), enter your EUA Credentials, if you have an EUA ID, or ICT Username and Password, and then click the Log In button (ICT Credentials are case-sensitive) (Figure 41).
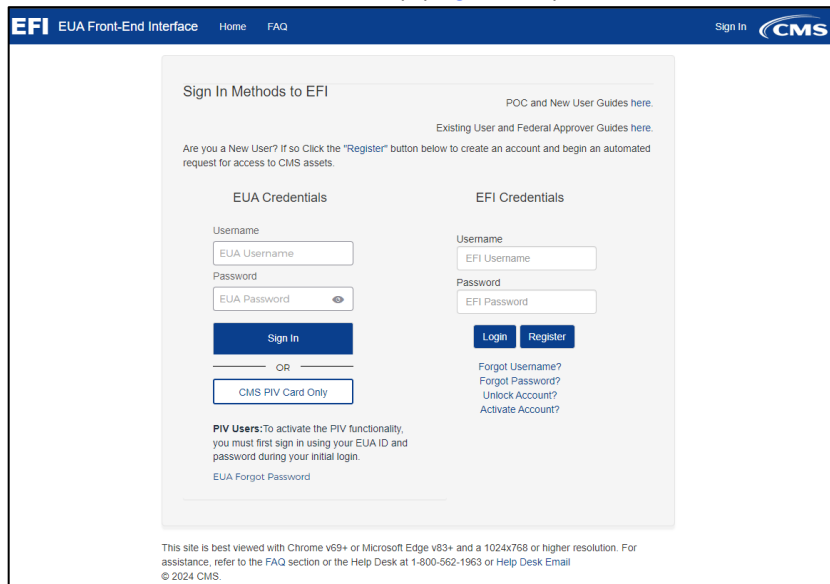

Figure 41: ICT Sign-In Page

2. At the WARNING pop-up message, once you are ready to continue. A successful log in will take you to the ICT Home page. Go to the top menu, click **Manage,** and then **POC Authorities** (Figure 42).
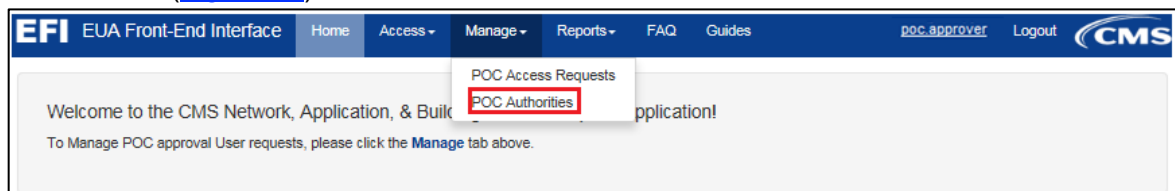
Figure 42: Manage Approval Authority – POC Authorities Menu

3. Select from the list or search for the POC who made the request for Approval Authority using the **Search** text field on the "Manage Point of Contact (POC) Delegated Approval Authorities" page (Figure 43).

Figure 43: Manage Approval Authority – Page

4. The "Approved" status of **true** indicates Approval Authority was given to that user, while **false** indicates the approval is still pending, and you should look for an email request. You can click on the **Remove** link button to remove the user's Approval Authority.

12.0 Where to find this POC Guide

This POC Guide is accessible from the ICT log in screen (Figure 44).

Figure 44: User Guide on Log In Screen

This ICT POC Guide is accessible in the following locations:

- Users without a CMS EUA ID: Contracting Policy and Guidance (https://www.cms.gov/About-CMS/Contracting-With-CMS/ContractingGeneralInformation/Contracting-Policy-and-Resources.html)
- Users who access from a CMS Office or VPN (requires CMS EUA ID and password) CMS EUA Documentation Repository in the Learning Management System (LMS) (https://cms-lms.usalearning.net/course/view.php?id=23)
- Users without access to a CMS Office or VPN (requires CMS EUA ID and password) CMS EUA Documentation Repository in the Learning Management System (LMS) (https://cms-lms.usalearning.net/course/view.php?id=23)

APPENDIX A: FAQ (Frequently Asked Questions)

Please refer to the FAQ on the ICT website for other common questions (Figure 45).
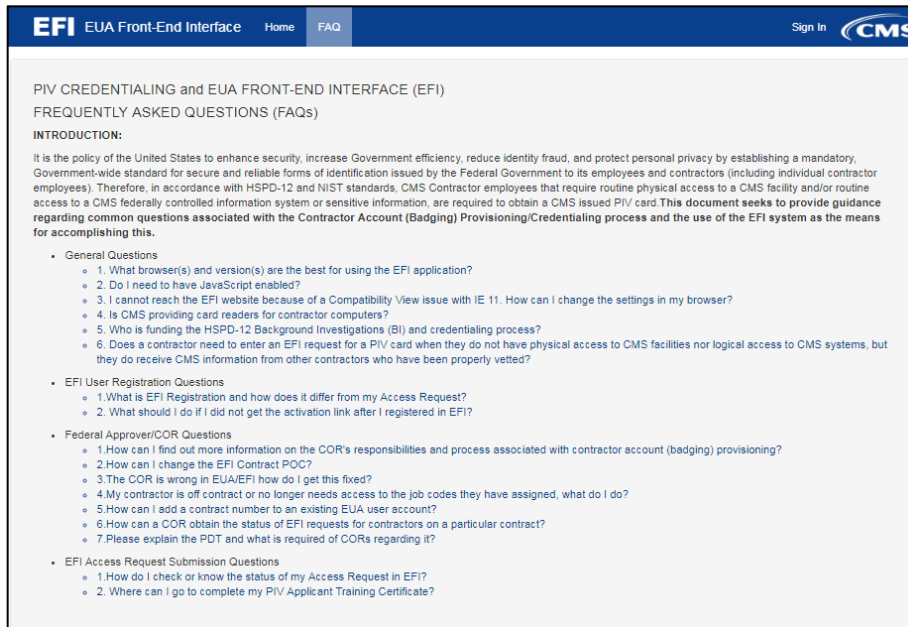
Figure 45: Welcome to the ICT Frequently Asked Questions (FAQ) Page

0.1 I cannot log-in to ICT. It is taking me back to the HOME page

Please ensure that you are entering your ICT credentials correctly (ICT is CASE SENSITIVE) and that you are NOT using the link from the email notification you receive from either account activation or password reset.

0.2 I am getting system errors and cannot approve ICT requests

ICT website is not compliant with Mozilla Firefox, Safari or Microsoft Internet Explorer browsers. If you are having these issues, try opening ICT in either Google Chrome v69+, or newer, or Microsoft Edge v89+ or newer.

0.3 Approval process for contractors

For a contractor, once the request has been submitted, it will be reviewed by the contract Point of Contact (POC) or a user with Approval Authority for that contract **(This must be someone at the contract company).** After the POC approves the request, the form will be sent to the Federal Approver/Contract Officer Representative (COR) for final review and the user will then receive an email notification.

APPENDIX B: Revision History

Date	Version	Description of Changes
12/15/2017	1.3	Updated information for Introduction. Updated information and some screenshots for Approve Access Request, Return Access for Modification, Reject and Delete Access Request, Request Approval Authority, Approve and Deny Approval Authority and Manage Approval Authority.
02/21/2018	1.4	Updated information for Introduction. Updated information and notes for Request POC Approval Authority. Added a note in the Approve and Deny Approval Authority. Added FAQ (Frequently ask questions)
03/16/2018	1.5	Reformatted
06/12/2018	1.6	Updated with current screenshots.
07/18/2018	1.7	Updated with current screenshots and text providing details regarding Reason for Issuance values in the PIV Request column.
04/03/2019	1.8	Updated screenshots for new Return button and added section 2.1 for Return to Manage Submitted Access Requests steps. Updated URL's for EUADOCS page.
05/31/2019	1.9	Updated screenshots
06/06/2019	2.0	Updated FAQ
07/08/2019	2.1	Updated screenshots for Export 745 link removed from menu for 2.0 Approve Access Request, 3.0 Return Access Request for Modification, 4.0 Reject and Delete Access Request and 7.0 Manage Approval Authority
08/03/2021	2.2	Updated Appendix A, 2 to specify browser compatibility.
06/25/2024	2.3	Sections 2.0 – 4.0 added for EUA IDM sign in
08/07/2024	2.4	Updated EFI references to ICT
11/26/2024	2.5	Removed "Formerly known as EFI"
03/10/2025	2.6	Reformatted the document to meet accessibility best practices.
04/17/2025	2.7	Outlined the ICT Registration section and added it to the table of contents. Scaled down the Introduction section.